APPENDIX B

OVERSEAS TRAVELERS TO UTAH IN-DEPTH PROFILE ANALYSIS

Overseas Visitors to Utah
Overseas Visitors to Utah National Parks
Overseas Visitors to Salt Lake City
Overseas Visitors to Las Vegas

OVERSEAS TRAVELERS TO UTAH
In-Depth Visitor Profile

A profile of overseas visitors to Utah was conducted on behalf of the Utah Travel Council by CIC Research, Inc. using In-Flight Survey Data from ITA Tourism Industries (a division of the U.S. Dept. of Commerce). The profile reflects information gathered from January through December 1997-1999. *The analysis does not include visitors from either Canada or Mexico.* The data revealed two major types of overseas travelers to Utah who were very different in terms of demographic characteristics, travel patterns and purposes and activities.

The groups are identified as visitors to Utah's National Parks (40%) and visitors to Salt Lake City, or the business and ski visitor (32%). Each visitor group has a very different visitor profile. The state's complete profile is more accurately the combination of these two different groups. Each of the three overseas visitor groups (overall, national park and Salt Lake City) is presented in some detail below. A special analysis is also included on the Las Vegas visitor because of the increasing relevance of that growing market to Utah.

Utah's top overseas markets are located in Western Europe and Japan. Germany (23%), France (16%), the United Kingdom (11%), the Benelux countries (10%), Japan (8%) and Italy (6%) represent Utah's top markets. Given existing trends and forecasted growth in international tourism from many regions of the world, Utah anticipates eventual growth in arrivals from several emerging markets, including countries in South America (Brazil and Argentina), Scandinavia, Asia (Korea and Taiwan), Mexico and Australia.

Demographics

- The average age of the overseas visitor to Utah is 42, with nearly 50% of all visitors in the 35-54 age grouping.
- The large majority travel with a spouse (37%) or with other family members (34%). Fewer travel alone (21%) or with friends (15%). However, *90% of all overseas visitors are adults, in contrast to the family-dominated domestic travel market.*
- Over two-thirds of all overseas visitors are men (68%), although since one in five overseas visitors is on a business-related trip, the higher percentage of male visitors is not unexpected.
- Over 22% of all overseas visitors boast annual household incomes of greater than $100,000. The average household income is $72,800.

Travel Patterns

- *Roughly two-thirds of overseas visitors to Utah (68%) are repeat visitors to the U.S.*
- The majority of overseas travelers to Utah enter the country through Los Angeles (26%), San Francisco (15%) and New York (10%). Other common ports of entry include Chicago (8%), Detroit (4%), Cincinnati (4%), Washington D.C. (4%) and Atlanta (3%).
- Once in the U.S., most overseas travelers prefer to travel in rental vehicles (58%). Many also take advantage of domestic air transportation (40%).
- The average stay within the U.S. is 23.5 nights, while the Utah portion of the trip averages 5.7 nights.[1]

[1] While the average stay in the U.S. is 23.5 nights, there is a significant difference between Western European visitors and Japanese visitors. The Japanese visitor spends 12.7 nights in the U.S. as opposed to the 18-25 nights spent in the U.S. by European travelers. In relative terms, the Japanese visitor dedicates a greater portion of his/her trip to Utah.

- On average, the overseas visitor will visit 3.8 states and 5.3 specific destinations while on their trip to the U.S. Besides Utah, other common destinations include California (San Francisco, Los Angeles, Yosemite and San Diego), Nevada (Las Vegas), Arizona (Grand Canyon, Phoenix), Colorado and Wyoming (Yellowstone).
- Within the state, Salt Lake City is visited by nearly a third of all overseas visitors (32%). Other commonly visited destinations include Bryce Canyon National Park (25%), Zion National Park (13%), Monument Valley Navajo Tribal Park (12%) and Glen Canyon National Recreation Area (5%).
- Over three-fourths (76%) of overseas travelers stay in hotels or motels with the remainder split between private homes and camping.
- The average overseas visitor spends $81 per day.
- On average, the trip decision is made approximately four months in advance (120 days), with air reservations and other arrangements made closer to the departure dates.
- The most common sources of information include travel agencies (65%), travel guides (25%), friends and relatives (24%), state or city travel offices (15%), personal computers (12%) and airlines (11%).
- Only 30% of overseas travelers indicated they had purchased a vacation package, with the most frequent type of package including air and lodging. Other common packages include guided tours or air and car rentals.

Travel Purposes and Activities

- The majority of overseas travelers to Utah arrive for leisure purposes (81%), including 10% who arrive to visit friends and relatives. The remaining 19% is comprised of business trips, convention activity and studying or teaching trips.
- The most common activity for overseas visitors to Utah is shopping (86%) and dining (81%). National Parks (78%), sightseeing in cities (58%), historic places (55%), touring the countryside (54%) and visiting small towns (51%) are also popular activities among Utah's overseas travelers.
- *Compared to national averages, the overseas visitor to Utah is more than twice as likely to visit Native American communities, camp or hike, visit national parks, gamble, snow ski, participate in environmental or eco excursions, tour the countryside and visit ethnic, cultural or heritage sites.*
- Utah overseas visitors are less likely than the average U.S. overseas visitor to play golf or tennis, go on cruises, participate in water sports or sunbathe, shop or dine in restaurants.

OVERSEAS VISITORS TO UTAH SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)	
Averare Age (mean)	42.2
18-34 Years	34%
35-54 Years	48%
55+ Years	18%

HOUSEHOLD INCOME ($US)	
Average HH Income	$72,800
< $40,000	27%
$40,000 - $80,000	39%
$80,000 - $120,000	19%
$120,000+	15%

PARTY COMPOSITION	
Avg. Travel Party (mean)	1.9
Spouse	37%
Family/Relatives	34%
Traveling Alone	21%
Friends	15%
Business Associates	6%
Group Tour	5%
Adults Only	90%
Adults and Children	10%

GENDER	
Men	68%
Women	32%

FREQUENT TRAVELERS	
Repeat Visitor to the U.S.	68%
U.S. Trips last 12 Months	1.6
U.S. Trips last 5 Years	4.0
1 Trip	41%
2 - 5 Trips	41%
5+ Trips	18%

ORIGIN MARKETS (1999 only)	
Germany	23%
France	16%
U.K.	11%
Benelux	10%
Japan	8%
Italy	6%
Switzerland	5%
Oceania	4%
Scandinavia	3%
South America	3%

PORT OF ENTRY	
Los Angeles	26%
San Francisco	15%
New York	10%
Chicago	8%
Detroit	4%
Cinncinnati	4%

TRAVEL PATTERNS

ADVANCE TRIP PLANNING	
Advance Trip Decision	120 Days
Advance Air Reservations	77 Days
Use of Pre-Booked Lodging	66%

USE OF PACKAGES	
YES	30%
Air/Lodging	18%
Guided Tour	15%
Air/Rental Car	12%
Air/Lodging/Tour	9%
Air/Lodging/Rental Car	8%
Air/Lodging/Bus	7%
Air/Lodging/Bus/Tour	6%
Advance Package Booking	93 Days
# of Nights Pre-paid as Part of a Package	12.8

INFORMATION SOURCES	
Travel Agency	65%
Travel Guides	25%
Friends/Relatives	24%
State/City Travel Office	15%
Personal Computer	12%
Airlines Directly	11%
Tour Company	9%
Newspapers/Magazines	9%
Other	10%

EXPENDITURES	
Avg. Spending Per-Visitor-Per-Day (mean)	$81

ACCOMMODATIONS	
Hotel/Motel	76%
Private Home	13%
Other	14%

TRANSPORTATION IN U.S.	
Rented Auto	58%
Airlines in U.S.	40%
Taxi/Cab/Limousine	27%
Company or Private Auto	23%
City Subway/Tram/Bus	17%

LENGTH OF STAY	
# of Nights In Utah (mean)	5.7
# of Nights in US (mean)	23.5

UTAH DESTINATIONS VISITED	
Salt Lake City	32%
Bryce Canyon N.P.	25%
Zion N.P.	13%
Monument Valley	12%
Glen Canyon	5%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP	
Leisure & VFR	81%
Leisure/Rec./Holidays	70%
Visit Friends/Relatives	10%
Other	1%
Business & Convention	19%
Business/Professional	13%
Convention/Conference	5%
Study/Teaching	2%

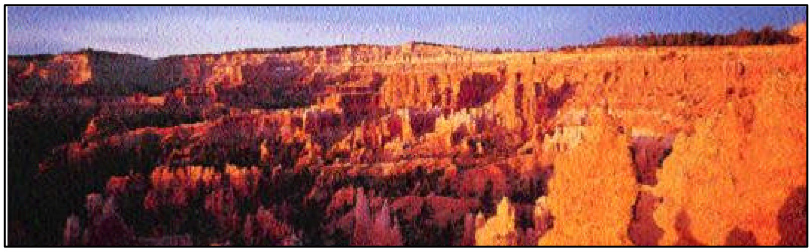
OTHER DESTINATIONS VISITED	
# of States Visited	3.8
# of Destinations Visited	5.3
California	70%
San Francisco	42%
Los Angeles	40%
Yosemite N.P.	13%
San Diego	11%
Nevada	58%
Las Vegas	53%
Arizona	55%
Grand Canyon N.P.	32%
Phoenix	10%
Colorado	12%
Wyoming	12%
Yellowstone N.P.	9%

LEISURE ACTIVITIES	
Shopping	86%
Dining in Restaurants	81%
Visit National Parks	78%
Sightseeing in Cities	58%
Visit Historic Places	55%
Touring Countryside	54%
Visit Small Towns	51%
Amusement/Theme Parks	46%
Casinos/Gambling	45%
Cultural or Heritage Sites	38%
Visit Am. Indian Comm.	32%
Guided Tours	26%
Art Gallery/Museum	24%
Water Sports/Sunbathing	22%
Camping/Hiking	21%
Concert/Play/Musical	13%
Environ./Eco Excursions	11%
Nightclubs/Dancing	9%
Attend Sports Event	7%
Snow Skiing	6%
Golfing/Tennis	5%
Cruises	4%
Ranch Vacations	2%
Hunting/Fishing	2%

VISITATION VOLUME (1999 only)	
Total Int'l. Visitation (000s)	700

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries

INTERNATIONAL VISITORS TO NATIONAL PARKS



Over 40% of all visitors to Utah were identified as National Park visitors as a result of identifying a national park as a primary destination during a trip to the U.S. Overall, 78% of all Utah's overseas visitors indicated that visiting a national park (whether a primary destination or not) was one of several activities participated in during a U.S. trip. National Park visitors to Utah have specific traveler characteristics that make this traveling segment unique and different from other travel segments.

Demographics. The average national park visitor to Utah is less affluent than other visitors to the state. As a result, average daily spending is also less than the statewide average for all overseas visitors. *Leisure groups (spouse, family members, friends and group tours) are much more common among national park visitors than among all visitors to the state.* European markets, led by Germany, France and the U.K, dominate the national park traveler segment. Italy, the Benelux countries and Switzerland are also important markets within this travel segment. The only non-European country that represents a significant market for national park travelers is Japan.

Travel Patterns. The national park visitor is typically a less experienced U.S. traveler. Consequently, advance trip decisions are often made well in advance (133 days) and packages are more common than among all overseas travelers to the state. National park travelers typically spend less time in Utah as well as in the U.S. compared to other groups, although they are often more mobile than other travelers, demonstrating a tendency to visit more states and more destinations than all travelers to the state. Car rentals are the preferred choice of transportation within the U.S. While the majority stay in either a hotel or motel, a significant number also camp. Among favored destinations, the national park traveler is more likely to make trips to California (San Francisco, Los Angeles, Yosemite, San Diego and Death Valley), Arizona (Grand Canyon and Phoenix) and Nevada (Las Vegas). Among Utah destinations, Bryce Canyon National Park was the preferred destination, followed by Zion National Park, Monument Valley Navajo Tribal Park and Glen Canyon National Recreation Area. *Salt Lake City was only mentioned as a destination by 4% of national park visitors.*

Purposes and Activities. Travel to national parks is almost exclusively a leisure travel activity. Over 90% of national park travelers to Utah indicated their primary purpose was a leisure trip. As expected, national park travelers tend to participate in a wide variety of outdoor activities. Compared to all travelers to the state, national park travelers are more likely to visit national parks, gamble, visit cultural or heritage sites, camp or hike and participate in an eco or environmental excursion. Conversely, national park visitors are less likely to attend a concert, play or musical, visit a nightclub or sporting event, and play golf, tennis or ski.

OVERSEAS VISITORS TO UTAH SUMMARY - 1997-1999*

Overseas Travelers who visit National Parks (40% of all Overseas Travelers to Utah)

DEMOGRAPHICS

AGE (years)

Averare Age (mean)	42.1
18-34 Years	36%
35-54 Years	46%
55+ Years	19%

HOUSEHOLD INCOME ($US)

Average HH Income	$66,500
< $40,000	30%
$40,000 - $80,000	41%
$80,000 - $120,000	18%
$120,000+	11%

PARTY COMPOSITION

Avg. Travel Party (mean)	2.2
Spouse	44%
Family/Relatives	36%
Friends	19%
Traveling Alone	12%
Group Tour	7%
Business Associates	2%
Adults Only	88%
Adults and Children	12%

GENDER

Men	66%
Women	35%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	61%
U.S. Trips last 12 Months	1.3
U.S. Trips last 5 Years	2.7
1 Trip	48%
2 - 5 Trips	41%
5+ Trips	11%

ORIGIN MARKETS (1999 only)

Germany	26%
France	21%
U.K.	12%
Italy	8%
Benelux	8%
Japan	8%
Switzerland	6%
Oceania	2%

PORT OF ENTRY

Los Angeles	29%
San Francisco	17%
Chicago	8%
Detroit	7%
New York	6%

VISITATION VOLUME (1999 only)

Total Int'l. Visitation (000s)	283

TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	133 Days
Advance Air Reservations	91 Days
Use of Pre-Booked Lodging	68%

USE OF PACKAGES

YES	40%
Air/Lodging	28%
Guided Tour	20%
Air/Rental Car	18%
Air/Lodging/Tour	14%
Air/Lodging/Rental Car	13%
Air/Lodging/Bus	10%
Air/Lodging/Bus/Tour	9%
Advance Package Booking	90 Days
# of Nights Pre-paid as Part of a Package	13.3

INFORMATION SOURCES

Travel Agency	65%
Travel Guides	31%
Friends/Relatives	26%
State/City Travel Office	20%
Personal Computer	13%
Newspapers/Magazines	12%
Tour Company	11%
Airlines Directly	7%
Other	8%

EXPENDITURES

Avg. Spending Per-Visitor-Per-Day (mean)	$73

ACCOMMODATIONS

Hotel/Motel	80%
Private Home	1%
Other	21%

TRANSPORTATION IN U.S.

Rented Auto	65%
Airlines in U.S.	30%
Taxi/Cab/Limousine	22%
City Subway/Tram/Bus	19%
Company or Private Auto	15%

LENGTH OF STAY

# of Nights In Utah (mean)	3.7
# of Nights in US (mean)	20.6

UTAH DESTINATIONS VISITED

Bryce Canyon N.P.	63%
Zion N.P.	32%
Monument Valley	30%
Glen Canyon	12%
Salt Lake City	4%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	93%
Leisure/Rec./Holidays	88%
Visit Friends/Relatives	5%
Business & Convention	7%
Business/Professional	3%
Convention/Conference	4%
Study/Teaching	1%

OTHER DESTINATIONS VISITED

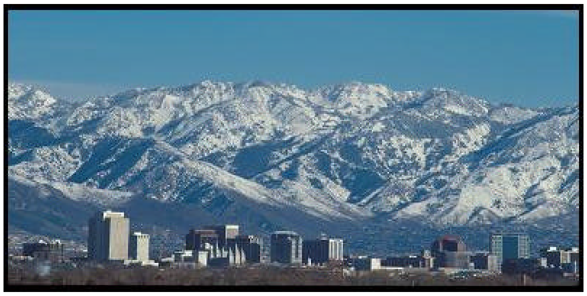
# of States Visited	3.9
# of Destinations Visited	6.3
California	83%
San Francisco	56%
Los Angeles	51%
Yosemite N.P.	28%
San Diego	14%
Death Valley N.P.	10%
Arizona	81%
Grand Canyon N.P.	65%
Phoenix	14%
Nevada	74%
Las Vegas	74%
Wyoming	10%
Yellowstone N.P.	9%
Colorado	9%
New York	7%
New York City	7%

LEISURE ACTIVITIES

Visit National Parks	92%
Shopping	85%
Dining in Restaurants	79%
Sightseeing in Cities	59%
Visit Historic Places	58%
Touring Countryside	58%
Visit Small Towns	54%
Casinos/Gambling	53%
Amusement/Theme Parks	49%
Cultural or Heritage Sites	45%
Visit Am. Indian Comm.	38%
Guided Tours	30%
Camping/Hiking	27%
Art Gallery/Museum	24%
Water Sports/Sunbathing	22%
Environ./Eco Excursions	15%
Ethnic Heritage Sites	13%
Concert/Play/Musical	8%
Nightclubs/Dancing	6%
Attend Sports Event	4%
Cruises	4%
Ranch Vacations	3%
Golfing/Tennis	2%
Hunting/Fishing	1%
Snow Skiing	1%

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries

INTERNATIONAL VISITORS TO SALT LAKE CITY
- BUSINESS AND SKI TRIPS -



Nearly a third of all overseas visitors to Utah visited Salt Lake City, making it the most popular Utah destination specifically named in the survey. There are several important differences between overseas visitors to Salt Lake City and overseas visitors to the rest of the state.

Nearly 40% of all visits to Salt Lake City by overseas travelers are made as a result of a business trip. In addition, overseas visitors to Salt Lake City are more than twice as likely to ski than visitors to the rest of the state. The implications of a larger percentage of business travelers and the greater incidence of skier visits significantly influence the characteristics of visitors to the city.

Demographics. Visitors to Salt Lake City are typically more affluent and spend significantly more than their counterparts to the rest of the state. Men, many of whom are traveling alone, comprise a higher percentage of trips to Salt Lake City than to the rest of the state. The business link between Salt Lake City and Japan is especially important and Japanese travelers comprise the second largest group of travelers to Salt Lake City, nearly equal to the number of German travelers. The popularity of Utah skiing among visitors from the U.K, Australia, South America and Scandinavia means that visitors from these regions are more common to Salt Lake City than to the rest of the state. Conversely, Germans, French, Italians and Dutch travelers are less likely to visit Salt Lake City and more likely to visit the rest of the state.

Travel Patterns. Visitors to Salt Lake City typically stay longer in Utah but shorter in the U.S. compared to other overseas visitors to the state. They visit fewer states and destinations than other Utah visitors, and even indicate very little travel to other Utah destinations. Los Angeles and San Francisco remain the primary ports of entry, although Miami and Atlanta each become more important given use of both as a gateway from Latin American countries and the Delta connection between Salt Lake City and Atlanta. Salt Lake City visitors indicate a much shorter planning horizon and are more likely to be frequent travelers to the U.S. than other Utah visitors. Package deals are used even less frequently by travelers to Salt Lake City than to the rest of the state.

Purposes and Activities. As previously indicated, Salt Lake City attracts a significantly greater amount of business-related travel. Within the leisure component however, overseas visitors to Salt Lake City are much more likely to visit friends and relatives than other visitors to the state. Salt Lake City visitors are less likely to participate in many of the common leisure activities indicated by other travelers to the state. Nonetheless, as with all overseas visitors to the state, shopping, dining, national parks, cities, historic places and touring the countryside were still the top activities engaged in by Salt Lake visitors. However, in contrast to other Utah visitors, travelers to Salt Lake City were more likely to visit Yellowstone and the Grand Canyon than to visit the Utah national parks. Salt Lake visitors are more likely to attend a concert, play or musical, visit nightclubs, ski or play golf and tennis.

OVERSEAS VISITORS TO UTAH SUMMARY - 1997-1999*
Overseas Travelers who Visit Salt Lake City (32% of all Overseas Travelers to Utah)

DEMOGRAPHICS

AGE (years)	
Averare Age (mean)	42.0
18-34 Years	34%
35-54 Years	50%
55+ Years	16%

HOUSEHOLD INCOME ($US)	
Average HH Income	$80,400
< $40,000	25%
$40,000 - $80,000	35%
$80,000 - $120,000	21%
$120,000+	19%

PARTY COMPOSITION	
Avg. Travel Party (mean)	1.6
Traveling Alone	36%
Spouse	24%
Family/Relatives	23%
Business Associates	12%
Friends	11%
Group Tour	4%
Adults Only	95%
Adults and Children	6%

GENDER	
Men	74%
Women	26%

FREQUENT TRAVELERS	
Repeat Visitor to the U.S.	66%
U.S. Trips last 12 Months	2.1
U.S. Trips last 5 Years	5.7
1 Trip	28%
2 - 5 Trips	40%
5+ Trips	32%

ORIGIN MARKETS (1999 only)	
Germany	15%
Japan	14%
U.K.	12%
Oceania	7%
Benelux	6%
France	6%
South America	6%
Scandinavia	6%
Switzerland	5%
Italy	4%

PORT OF ENTRY	
Los Angeles	21%
San Francisco	12%
New York	11%
Chicago	8%
Cinncinnati	7%
Atlanta and Miami (each)	6%

TRAVEL PATTERNS

ADVANCE TRIP PLANNING	
Advance Trip Decision	95 Days
Advance Air Reservations	57 Days
Use of Pre-Booked Lodging	65%

USE OF PACKAGES	
YES	18%
Guided Tour	10%
Air/Lodging	8%
Air/Rental Car	6%
Air/Lodging/Tour	5%
Air/Lodging/Bus	3%
Air/Lodging/Bus/Tour	3%
Air/Lodging/Rental Car	2%
Advance Package Booking	79 Days
# of Nights Pre-paid as Part of a Package	11.7

INFORMATION SOURCES	
Travel Agency	66%
Friends/Relatives	20%
Travel Guides	15%
Airlines Directly	13%
Personal Computer	11%
State/City Travel Office	10%
Tour Company	9%
Corporate Travel Dept.	8%
Newspaper/Magazine	6%
Other	4%

EXPENDITURES	
Avg. Spending Per-Visitor-Per-Day (mean)	$107

ACCOMMODATIONS	
Hotel/Motel	71%
Private Home	27%
Other	8%

TRANSPORTATION IN U.S.	
Rented Auto	49%
Airlines in U.S.	49%
Taxi/Cab/Limousine	37%
Company or Private Auto	34%
City Subway/Tram/Bus	15%

LENGTH OF STAY	
# of Nights In Utah (mean)	7.5
# of Nights in US (mean)	22.4

UTAH DESTINATIONS VISITED	
Bryce Canyon N.P.	3%
Monument Valley	2%
Zion N.P.	1%
Glen Canyon	0%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP	
Leisure & VFR	62%
Leisure/Rec./Holidays	44%
Visit Friends/Relatives	17%
Other	1%
Business & Convention	38%
Business/Professional	28%
Convention/Conference	8%
Study/Teaching	3%

OTHER DESTINATIONS VISITED	
# of States Visited	3.3
# of Destinations Visited	4.1
California	48%
Los Angeles	26%
San Francisco	24%
Nevada	31%
Las Vegas	29%
Wyoming	18%
Yellowstone N.P.	13%
Arizona	16%
New York	14%
New York City	13%
Colorado	11%
Denver	9%
Florida	10%

LEISURE ACTIVITIES	
Shopping	86%
Dining in Restaurants	83%
Visit National Parks	55%
Sightseeing in Cities	50%
Visit Historic Places	48%
Touring Countryside	42%
Visit Small Towns	38%
Amusement/Theme Parks	34%
Cultural or Heritage Sites	29%
Casinos/Gambling	28%
Concert/Play/Musical	28%
Art Gallery/Museum	21%
Guided Tours	17%
Visit Am. Indian Comm.	17%
Water Sports/Sunbathing	16%
Snow Skiing	13%
Nightclubs/Dancing	12%
Camping/Hiking	9%
Attend Sports Event	9%
Golfing/Tennis	8%
Environ./Eco Excursions	5%
Cruises	4%
Hunting/Fishing	3%
Ranch Vacations	2%

VISITATION VOLUME (1999 only)	
Total Int'l. Visitation (000s)	700

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries

INTERNATIONAL VISITORS TO LAS VEGAS

Las Vegas recorded over two million overseas visitors in 1999, nearly six times as many as Utah. McCarran International Airport in Las Vegas accommodated more than 3,500 direct international flights in 2000, most of them from Utah's top international markets – Canada, Japan and the U.K. In addition, growth in international arrivals to Las Vegas is growing much more quickly than growth in international arrivals to Utah. Despite many differences between overseas visitors to Utah and overseas visitors to Las Vegas, Utah may be able to capitalize on Las Vegas as an international gateway to the state and could potentially increase awareness of Utah attractions by emphasizing Utah's proximity to Las Vegas. From 1997 to 1999, *more than half (53%) of Utah's overseas travelers also visited Las Vegas. But only 10% of all the overseas visitors to Las Vegas came to Utah.* Tapping that large and fast-growing market represents a growth opportunity for Utah's international tourism.

Despite being younger on average, overseas visitors to Las Vegas are more affluent and spend more than overseas visitors to Utah. In addition, Las Vegas captures a much greater percentage of the Asian market. In addition to Japan, Taiwan and South Korea are also among Las Vegas' top markets. Visitors from South America and Mexico also represent a higher percentage of visitors to Las Vegas than to Utah. By contrast, Utah is much more dependent than Las Vegas on Western Europe.

Overseas trips to Las Vegas are typically planned with a much shorter planning horizon than trips to Utah. In addition, travelers to Las Vegas are more likely to take advantage of a packaged deal. Consistent with the greater influence of Asian travel patterns versus Western European travel patterns, trips to Las Vegas are typically shorter and visit fewer states and destinations than trips to Utah. Visitors to Las Vegas are less likely to visit Arizona, Colorado and Wyoming, but more likely to visit Los Angeles, Anaheim and Florida. Overseas travelers to Las Vegas are more likely than their Utah counterparts to stay in a hotel or motel and travel by taxi or limo as opposed to rental cars. Airline service within the U.S. to Las Vegas is also more important than corresponding service to Utah.

The overseas visitor to Utah is more likely to participate in a wide variety of activities. Visitors to Utah are more likely than their Las Vegas counterparts to visit natural resource-based attractions, historic, ethnic or cultural sites, small towns or Native American communities. Overseas visitors to Utah are also more likely to participate in outdoor recreation activities like camping and hiking or snow skiing. On the other hand, Las Vegas travelers are more likely to gamble, visit theme or amusement parks, participate in guided tours and visit nightclubs.

OVERSEAS VISITORS TO LAS VEGAS SUMMARY - 1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)	
Averare Age (mean)	40.3
18-34 Years	39%
35-54 Years	45%
55+ Years	15%

HOUSEHOLD INCOME ($US)	
Average HH Income	$73,600
< $40,000	28%
$40,000 - $80,000	37%
$80,000 - $120,000	19%
$120,000+	15%

PARTY COMPOSITION	
Avg. Travel Party (mean)	2.0
Spouse	36%
Family/Relatives	29%
Traveling Alone	19%
Friends	18%
Business Associates	10%
Group Tour	6%
Adults Only	92%
Adults and Children	8%

GENDER	
Men	67%
Women	33%

FREQUENT TRAVELERS	
Repeat Visitor to the U.S.	67%
U.S. Trips last 12 Months	1.6
U.S. Trips last 5 Years	4.6
1 Trip	40%
2 - 5 Trips	38%
5+ Trips	22%

ORIGIN MARKETS	
Japan	23%
U.K.	15%
Germany	11%
France	7%
Oceania	5%
South America	5%
Benelux	4%
Taiwan	4%
Italy	4%
South Korea	3%

PORT OF ENTRY	
Los Angeles	36%
San Francisco	13%
New York	8%
Chicago	5%
Miami	4%

TRAVEL PATTERNS

ADVANCE TRIP DECISION	
Advance Trip Decision	89 Days
Advance Air Reservations	55 Days
Use of Pre-Booked Lodging	71%

USE OF PACKAGES	
YES	35%
Air/Lodging	24%
Guided Tour	21%
Air/Lodging/Tour	14%
Air/Lodging/Bus	10%
Air/Lodging/Bus/Tour	8%
Air/Rental Car	7%
Air/Lodging/Rental Car	4%
Advance Package Booking	71 Days
# of Nights Pre-paid as Part of a Package	9.1

INFORMATION SOURCES	
Travel Agency	64%
Friends/Relatives	20%
Travel Guides	16%
Personal Computer	15%
Tour Company	14%
Airlines Directly	12%
Newspapers/Magazines	10%
State/City Travel Office	7%
Other	10%

EXPENDITURES	
Avg. Spending Per-Visitor-Per-Day (mean)	$110

ACCOMMODATIONS	
Hotel/Motel	96%
Private Home	3%
Other	1%

TRANSPORTATION IN U.S.	
Airlines in U.S.	50%
Rented Auto	41%
Taxi/Cab/Limousine	41%
Company or Private Auto	24%
City Subway/Tram/Bus	22%

LENGTH OF STAY	
# of Nights In LV (mean)	3.7
# of Nights in US (mean)	17.3

UTAH DESTINATIONS VISITED	
Bryce Canyon N.P.	4%
Zion N.P.	2%
Monument Valley	2%
Salt Lake City	2%
Glen Canyon	1%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP	
Leisure & VFR	80%
Leisure/Rec./Holidays	70%
Visit Friends/Relatives	10%
Business & Convention	20%
Business/Professional	11%
Convention/Conference	8%
Study/Teaching	2%

OTHER DESTINATIONS VISITED	
# of States Visited	2.7
# of Destinations Visited	3.9
California	75%
Los Angeles	57%
San Francisco	42%
San Diego	14%
Anaheim	7%
Yosemite N.P.	7%
Arizona	24%
Grand Canyon N.P.	14%
Phoenix	6%
New York	14%
New York City	13%
Utah	10%
Florida	8%

LEISURE ACTIVITIES	
Shopping	90%
Dining in Restaurants	85%
Casinos/Gambling	74%
Sightseeing in Cities	62%
Amusement/Theme Parks	61%
Visit National Parks	52%
Visit Historic Places	42%
Visit Small Towns	39%
Touring Countryside	36%
Guided Tours	34%
Cultural or Heritage Sites	25%
Water Sports/Sunbathing	20%
Concert/Play/Musical	19%
Art Gallery/Museum	17%
Nightclubs/Dancing	15%
Visit Am. Indian Comm.	14%
Cruises	7%
Golfing/Tennis	7%
Ethnic Heritage Sites	7%
Attend Sports Event	6%
Camping/Hiking	6%
Environ./Eco Excursions	4%
Snow Skiing	2%
Ranch Vacations	2%
Hunting/Fishing	1%

VISITATION VOLUME	
Total Int'l. Visitation (000s)	2,251

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries

Overseas Visitor Comparison

Traveler Characterisitc	Overall Utah	National Parks	Salt Lake City	Las Vegas
Visitation Volume (1999)	391,000	158,000	126,000	2,251,000
Average Age	42.2 Years	42.1 Years	42.0 Years	40.3 Years
Average Household Income	$72,800	$66,500	$80,400	$73,600
Origin Markets				
Western Europe	76%	86%	56%	48%
Asia	15%	12%	26%	39%
Oceania	4%	2%	7%	5%
South America	3%	0%	6%	5%
U.S. Trips in Last Five Years	4.0	2.7	5.7	4.6
Advance Trip Decision	120 Days	133 Days	95 Days	89 Days
Use of Packages	30%	40%	18%	35%
Per-Day Expenditures	$81	$73	$107	$110
Accommodations				
Hotel or Motel	76%	80%	71%	96%
Private Home	13%	1%	27%	3%
Other (Camping)	14%	21%	8%	1%
Transportation within the U.S.				
Rental Car	58%	65%	49%	41%
Airlines	40%	30%	49%	50%
Taxi/Cab/Limo	27%	22%	37%	41%
Average Length of Stay in Utah	5.7 Nights	3.7 Nights	7.5 Nights	3.7 Nights (LV)
Average Length of Stay in U.S.	23.5 Nights	20.6 Nights	22.4 Nights	17.3 Nights
Number of States Visited	3.8	3.9	3.3	2.7
Number of Destinations Visited	5.3	6.3	4.1	3.9
Utah Destinations				
Salt Lake City	32%	4%	100%	2%
Bryce Canyon N.P.	25%	63%	3%	4%
Zion N.P.	13%	32%	1%	2%
Monument Valley	12%	30%	2%	2%
Glen Canyon N.R.A.	5%	12%	0%	1%
Other Destinations				
California	70%	83%	48%	75%
Nevada	58%	74%	31%	10% (Utah)
Arizona	55%	81%	16%	24%
Colorado	12%	9%	11%	2%
Wyoming	12%	10%	18%	1%
Purpose of Trip				
Leisure and VFR	81%	93%	62%	80%
Business	19%	7%	38%	20%
Selected Activities				
Visit National Parks	78%	92%	55%	52%
Visit Historic Places	55%	58%	48%	42%
Touring Countryside	54%	58%	42%	36%
Visit Small Towns	51%	54%	38%	39%
Casinos/Gambling	45%	53%	28%	74%
Cultural or Heritage Sites	38%	45%	29%	25%
Visit Am. Indian Comm.	32%	38%	17%	14%
Guided Tours	26%	30%	17%	34%
Camping/Hiking	21%	27%	9%	6%
Concert/Play/Musical	13%	8%	28%	19%
Environ./Eco Excursions	11%	15%	5%	4%
Nightclubs/Dancing	7%	6%	12%	15%
Snow Skiing	6%	1%	13%	2%

SOURCE: TI/ITA, U.S. Dept. of Commerce